

About the Presenter



Monty W. Walker
CPA, CBI, BCB

(940) 322-5086

mwalker@waa-online.com

- A comprehensive business background in the private closely-held sector spanning over 24 years which includes experience in both startups and established entities
- He does not serve as a Business Intermediary. He is only provides Advisory Services.
- Works with clients throughout the country rendering support for Business Transactions, Business Exit Strategies, Business Tax Planning and Business Transition Planning.
- Supports and assists Business Intermediary's with their transactions throughout the Country
- Manages and administers plans which enable entrepreneurs to use their accumulated retirement money as a business capitalization source without incurring penalties and taxes. His advisory services in the qualified money arena include solutions using Self-Directed IRAs and Small Business Investment 401(k) Plans.
- Due to his background in the area of business planning and business transfers he is often referred to by his clients and colleagues as a --- "Business Transaction CPA"
- Developed and assists Entrepreneurs throughout the country with a unique proprietary comprehensive transaction planning review resulting in a deliverable entitled a Tax and Structuring Analysis Report..
- Developed and assists Entrepreneurs throughout the country with a unique holistic comprehensive planning program called "Entrepreneurial Life Planning".
- Subject Matter Expert for the International Business Brokers Association in the area of Business Transaction Taxation, Structuring and Planning. He is also an approved instructor for the International Business Brokers Association, the Texas Real Estate Commission and the Texas Department of Insurance..
- Is a member of the American Institute of Certified Public Accountants, the International Business Brokers Association, the Texas Association of Certified Public Accountants, the Texas Association of Business Brokers, the Institute of Certified Business Counselors and the Society of Financial Service Professionals
- Certified Public Accountant, Certified Business Intermediary, Board Certified Broker